

CLAIMS

1. (Original) A relationship management system, comprising:
a first database that stores a plurality of user collections, each user collection including one or more contact files, with the different contact files within a particular user collection having data pertaining to different contacts;
a second database that stores a firm collection, the firm collection including a multiplicity of further contact files, wherein each of the multiplicity of further contact files within the firm collection has data associated with one of the contacts for which a contact file exists within at least one of the plurality of user collections; and
an administration routine stored in a memory and adapted to be executed on a processor to detect a change made to one of the contact files associated with a particular contact within one or more of the plurality of user collections and to make a corresponding change to the further contact file associated with the particular contact within the firm collection.
2. (Original) The relationship management system of claim 1, further including a user collection change routine adapted to make a change to a contact file associated with the particular contact within a second one of the user collections based on the change made to the further contact file associated with the particular contact within the firm collection.
3. (Original) The relationship management system of claim 2, wherein the administration routine is further adapted to provide a message to a firm administrator reflecting the nature of the detected change made to one of the contact files associated with a particular contact within one or more of the plurality of user collections.
4. (Original) The relationship management system of claim 3, wherein the administration routine is further adapted to enable the firm administrator to accept or reject the corresponding change before the administration routine makes the corresponding change to the further contact file associated with the particular contact within the firm collection.

5. (Original) The relationship management system of claim 3, wherein the administration routine includes a rule database that stores rules pertaining to the manner in which the detected change is to be processed.

6. (Original) The relationship management system of claim 5, wherein the rules are changeable by the administrator.

7. (Original) The relationship management system of claim 2, wherein the administration routine is further adapted to process the detected change to detect a suspected error within the detected change.

8. (Original) The relationship management system of claim 7, wherein the administration routine is further adapted to provide a message to a firm administrator reflecting the nature of the suspected error within the detected change.

9. (Original) The relationship management system of claim 2, wherein each of the user collections includes a change attribute that specifies a manner in which a change made to the firm collection is to be reflected within the user collection.

10. (Original) The relationship management system of claim 9, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be automatically made to the user collection.

11. (Original) The relationship management system of claim 9, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be reported to a user having access to the user collection for which the change attribute exists.

12. (Original) The relationship management system of claim 9, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be accepted by the user having access to the user collection for which the change attribute exists before being made to the user collection for which the change attribute exists.

13. (Original) The relationship management system of claim 2, wherein each of the user collections includes a visibility field that specifies if a change made to a contact file within the user collection is to be shared with the firm collection.

14. (Original) The relationship management system of claim 13, wherein each of the contact files includes a plurality of contact information fields and wherein the visibility flag specifies a visibility of one of the contact information fields.

15. (Original) The relationship management system of claim 13, wherein each of the contact files includes a plurality of contact information fields and wherein the visibility flag specifies a visibility of an entire contact file.

16. (Original) The relationship management system of claim 2, wherein the administration routine is further adapted to process the detected change to detect the addition of a contact file for a contact within one of the user collections for which a further contact file already exists within the firm collection.

17. (Original) The relationship management system of claim 2, wherein the administration routine is further adapted to process the detected change to detect a user request for an administrator to make a change to the firm collection.

18. (Withdrawn) A relationship management system adapted to be used with a processor, a memory and a display device, comprising:

a computer readable medium;

a database storage routine stored on the computer readable medium and adapted to be executed on the processor to store, within the memory, contact information for each of a plurality of contacts, wherein the database storage routine is adapted to store a different contact file for a particular contact within each of a number of user collections with each of the number of user collections being accessible by a different user, and to store another contact file for the particular contact within a firm collection;

a display routine stored on the computer readable medium and adapted to be executed on the processor to display the contact information for the particular contact in each of the contact files within the user collections to the different users having access to the user collections; and

a change management routine stored on the computer readable medium and adapted to be executed on the processor to provide a change made to the contact information within the contact file for the particular contact within a first one of the user collections to the another contact file for the particular contact within the firm collection and to provide the change made to the another contact file for the particular contact within the firm collection to the contact file for the particular contact within a second one of the user collections.

19. (Withdrawn) The relationship management system of claim 18, wherein the change management routine is adapted to automatically make the change made to the contact information within the contact file for the particular contact within the first one of the user collections to the another contact file for the particular contact within the firm collection.

20. (Withdrawn) The relationship management system of claim 18, wherein the change management routine is adapted to notify the user that has access to the second one of the user collections of the change made to the firm collection.

21. (Withdrawn) The relationship management system of claim 18, wherein the change management routine is adapted to automatically make the change to the contact file for the particular contact within the second user collection when the change is made to the contact file for the particular contact within the firm collection and to notify the user having access to the second user collection of the change made to second user collection.

22. (Withdrawn) The relationship management system of claim 18, wherein the change management routine is adapted to notify the user having access to the second user collection of the change made to the firm collection and to enable the user having access to the second user collection to select whether or not the change management routine is to make the change to the second user collection.

23. (Withdrawn) The relationship management system of claim 18, wherein the change management routine includes a reporting routine that provides an indication of the change made to the contact file for the particular contact within the first one of the user collections to an administrator.

24. (Withdrawn) The relationship management system of claim 23, wherein the reporting routine provides the administrator with the ability to accept the change to be made to the another contact file for the particular contact within the firm collection before the change is made to the another contact file for the particular contact within the firm collection.

25. (Withdrawn) The relationship management system of claim 23, further including a filter that processes the change made to the contact file for the particular contact within the first one of the user collections to detect suspected errors within the change.

26. (Withdrawn) The relationship management system of claim 23, wherein the filter includes a rule database that stores rules and an expert engine that applies the rules to the change made to the contact file for the particular contact within the first one of the user collections to determine a manner of dealing with the change.

27. (Withdrawn) A method of storing information pertaining to a plurality of contacts in a relationship management system used by a multiplicity of users, comprising:

- creating a user collection for each of the multiplicity of users;
- creating a firm collection;
- storing a contact file for a particular contact within each of a number of the user collections;
- storing a contact file for the particular contact within the firm collection;
- recognizing a change made to the contact file for the particular contact within one of the user collections;
- providing the change made to the contact file for the particular contact within the one of the user collections to the firm collection to be reflected within the contact file for the particular contact within the firm collection.

28. (Withdrawn) The method of claim 27, further including providing the change made to the contact file for the particular contact within the firm collection to another one of the user collections.

29. (Withdrawn) The method of claim 28, wherein the step of providing the change made to the contact file for the particular contact within the one of the user collections to the firm collection includes notifying an administrator of the change.

30. (Withdrawn) The method of claim 29, wherein the step of providing the change made to the contact file for the particular contact within the one of the user collections to the firm collection includes enabling the administrator to accept or reject the change to be made to the firm collection.

31. (Withdrawn) The method of claim 28, wherein the step of providing the change made to the contact file for the particular contact within the one of the user collections to the firm collection includes analyzing the change to detect potential errors.

32. (Withdrawn) The method of claim 28, wherein the step of providing the change made to the contact file for the particular contact within the one of the user collections to the firm collection includes storing a set of changeable rules used to analyze the change.

33. (Withdrawn) The method of claim 28, wherein the step of providing the change made to the contact file for the particular contact within the one of the user collections to the firm collection includes analyzing the change to detect the addition of a contact file for a contact for which a contact file already exists within the firm collection.

34. (Withdrawn) The method of claim 28, wherein the step of providing the change made to the contact file for the particular contact within the firm collection to another one of the user collections includes automatically making the change to the another one of the user collections.

35. (Withdrawn) The method of claim 28, wherein the step of providing the change made to the contact file for the particular contact within the firm collection to another one of the user collections includes enabling the user having access to the another one of the user collections to accept or reject the change to the another one of the user collections.

36. (Withdrawn) The method of claim 28, further including enabling the user having access to the another one of the user collections to specify the manner in which a change is to be made to the another one of the user collections based on a change being made to the firm collection.

37. (Original) A relationship management system, comprising:
a database that stores a plurality of user collections, each user collection including one or more contact files, with the different contact files within a particular user collection having data pertaining to different contacts, the database further storing a firm collection, the firm collection including a multiplicity of further contact files, wherein each of the multiplicity of further contact files within the firm collection has data associated with one of the contacts for which a contact file exists within at least one of the plurality of user collections; and
an administration routine stored in a memory and adapted to be executed on a processor to detect a change made to one of the contact files associated with a particular contact within one or more of the plurality of user collections and to make a corresponding change to the further contact file associated with the particular contact within the firm collection.

38. (Original) The relationship management system of claim 37, further including a user collection change routine adapted to make a change to a contact file associated with the particular contact within a second one of the user collections based on the change made to the further contact file associated with the particular contact within the firm collection.

39. (Original) The relationship management system of claim 38, wherein the administration routine is further adapted to provide a message to a firm administrator reflecting the nature of the detected change made to one of the contact files associated with a particular contact within one or more of the plurality of user collections.

40. (Original) The relationship management system of claim 39, wherein the administration routine is further adapted to enable the firm administrator to accept or reject the corresponding change before the administration routine makes the corresponding change to the further contact file associated with the particular contact within the firm collection.

41. (Original) The relationship management system of claim 39, wherein the administration routine includes a rule database that stores rules pertaining to the manner in which the detected change is to be processed.

42. (Original) The relationship management system of claim 41, wherein the rules are changeable by the administrator.

43. (Original) The relationship management system of claim 38, wherein the administration routine is further adapted to process the detected change to detect a suspected error within the detected change.

44. (Original) The relationship management system of claim 43, wherein the administration routine is further adapted to provide a message to a firm administrator reflecting the nature of the suspected error within the detected change.

45. (Original) The relationship management system of claim 38, wherein each of the user collections includes a change attribute that specifies a manner in which a change made to the firm collection is to be reflected within the user collection.

46. (Original) The relationship management system of claim 45, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be automatically made to the user collection.

47. (Original) The relationship management system of claim 45, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be reported to a user having access to the user collection for which the change attribute exists.

48. (Original) The relationship management system of claim 45, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be accepted by the user having access to the user collection for which the change attribute exists before being made to the user collection for which the change attribute exists.

49. (Original) The relationship management system of claim 38, wherein each of the user collections includes a visibility field that specifies if a change made to a contact file within the user collection is to be shared with the firm collection.

50. (Original) The relationship management system of claim 49, wherein each of the contact files includes a plurality of contact information fields and wherein the visibility flag specifies a visibility of one of the contact information fields.

51. (Original) The relationship management system of claim 49, wherein each of the contact files includes a plurality of contact information fields and wherein the visibility flag specifies a visibility of an entire contact file.

52. (Original) The relationship management system of claim 38, wherein the administration routine is further adapted to process the detected change to detect the addition of a contact file for a contact within one of the user collections for which a further contact file already exists within the firm collection.

53. (Original) The relationship management system of claim 38, wherein the administration routine is further adapted to process the detected change to detect a user request for an administrator to make a change to the firm collection.

54. (Original) A relationship management system, comprising:
a database that stores a plurality of contact files, with the contact files having data pertaining to different contacts; and
an administration routine stored in a memory and adapted to be executed on a processor to detect a change made to one of the contact files associated with a particular contact, wherein the administration routine is adapted to provide a message to a firm administrator reflecting the nature of the detected change made to one of the contact files associated with a particular contact.

55. (Original) The relationship management system of claim 54, wherein the administration routine is further adapted to enable the firm administrator to accept or reject the corresponding change before the administration routine makes the corresponding change to the contact file associated with the particular contact.

56. (Original) The relationship management system of claim 54, wherein the administration routine includes a rule database that stores rules pertaining to the manner in which the detected change is to be processed.

57. (Original) The relationship management system of claim 56, wherein the rules are changeable by the firm administrator.

58. (Original) The relationship management system of claim 54, wherein the administration routine is further adapted to process the detected change to detect a suspected error within the detected change.

59. (Original) The relationship management system of claim 58, wherein the administration routine is further adapted to provide a message to a firm administrator reflecting the nature of the suspected error within the detected change.

60. (Withdrawn) A relationship management system adapted to be used with a processor, a memory and a display device, comprising:
a computer readable medium;
a database storage routine stored on the computer readable medium and adapted to be executed on the processor to store, within the memory, contact information for each of a plurality of contacts, wherein the database storage routine is adapted to store a different contact file for each of a plurality of contacts;
a display routine stored on the computer readable medium and adapted to be executed on the processor to display the contact information for one or more of the contacts; and
a change management routine stored on the computer readable medium and adapted to be executed on the processor to detect a change made to one or more of the contact files.

61. (Withdrawn) The relationship management system of claim 60, further comprising an administration routine stored on the computer readable medium, wherein the change management routine is adapted to provide a message to the administration routine reflecting the nature of the detected change made to one or more of the contact files.

62. (Withdrawn) The relationship management system of claim 61, wherein the administration routine is further adapted to enable a firm administrator to accept or reject the change made to one or more of the contact files.

63. (Withdrawn) The relationship management system of claim 61, wherein the administration routine includes a rule database storage routine stored on the computer readable medium and adapted to be executed on the processor to store, within the memory, rules pertaining to the manner in which the detected change is to be processed.

64. (Withdrawn) The relationship management system of claim 63, wherein the rules are changeable by the firm administrator.

65. (Withdrawn) The relationship management system of claim 61, wherein the administration routine is further adapted to process the detected change to detect a suspected error within the detected change.

66. (Withdrawn) The relationship management routine of claim 65, wherein the administration routine is further adapted to provide a message to a firm administrator reflecting the nature of the suspected error within the detected change.

67. (Original) A relationship management system, comprising:
a first database that stores a plurality of user collections, each user collection including one or more contact files, with the different contact files within a particular user collection having data pertaining to different contacts; and
a second database that stores a firm collection, the firm collection including a multiplicity of further contact files, wherein each of the multiplicity of further contact files within the firm collection has data associated with one of the contacts for which a contact file exists within at least one of the plurality of user collections.

68. (Original) The relationship management system of claim 67, wherein a first user collection stores at least one contact file associated with a particular contact, a second user collection stores at least one contact file associated with the particular contact, and the firm collection stores a single contact files associated with the contact files stored within the first and second user collections.

69. (Original) The relationship management system of claim 68, wherein each user collection is accessible by a different user and further comprising a display routine, wherein the display routine is adapted to display the data pertaining to different contacts stored within each user collection to the user having access to the user collection.

70. (Original) The relationship management system of claim 67, wherein the firm collection is administered by a firm administrator.

71. (Original) The relationship management system of claim 67, further comprising an administration routine, wherein the administration routine detects when a change is made to one of the contact files associated with a particular contact within one or more of the plurality of user collections, and makes a corresponding change to the contact file associated with the particular contact within the firm collection.

72. (Original) The relationship management system of claim 71, wherein the first database provides a message to the administration routine reflecting the nature of the change made to one of the contact files associated with a particular contact within one or more of the plurality of user collections.

73. (Original) The relationship management system of claim 72, wherein the administration routine provides a message to a firm administration reflecting the nature of the change made to one of the contact files associated with a particular contact within one or more of the plurality of user collections and wherein the firm administrator accepts or rejects the corresponding change before the corresponding change to the further contact file associated with the particular contact within the firm collection is made.

74. (Original) The relationship management system of claim 67, wherein each of the user collections includes a change attribute that specifies a manner in which a change made to the firm collection is to be reflected within the user collection.

75. (Original) The relationship management system of claim 74, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be automatically made to the user collection.

76. (Original) The relationship management system of claim 74, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be reported to a user having access to the user collection for which the change attribute exists.

77. (Original) The relationship management system of claim 74, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be accepted by the user having access to the user collection for which the change attribute exists before being made to the user collection for which the change attribute exists.

78. (Original) The relationship management system of claim 67, wherein each of the user collections includes a visibility field that specifies if a change made to a contact file within the user collection is to be shared with the firm collection.

79. (Original) The relationship management system of claim 78, wherein each of the contact files includes a plurality of contact information fields and wherein the visibility flag specifies a visibility of one of the contact information fields.

80. (Original) The relationship management system of claim 78, wherein each of the contact files includes a plurality of contact information fields and wherein the visibility flag specifies a visibility of an entire contact file.

81. (Withdrawn) A relationship management system adapted to be used with a processor, a memory and a display device, comprising:

a computer readable medium;

a database storage routine stored on the computer readable medium and adapted to be executed on the processor to store, within the memory, contact information for each of a plurality of contacts, wherein the database storage routine is adapted to store a different contact file for a particular contact within each of a number of user collections with each of the number of user collections being accessible by a different user, and to store another contact file for the particular contact within a firm collection; and

a display routine stored on the computer readable medium and adapted to be executed on the processor to display the contact information for the particular contact in each of the contact files within the user collections to the different users having access to the user collections.

82. (Withdrawn) The relationship management system of claim 81, wherein the database storage routine is further adapted to provide a change made to the contact information within the contact file for the particular contact within a first one of the user collections to the another contact file for the particular contact within the firm collection and to provide the change made to the another contact file for the particular contact within the firm collection to the contact file for the particular contact within a second one of the user collections.

83. (Withdrawn) The relationship management system of claim 82, further comprising a reporting routine stored on the computer readable medium and adapted to be executed on the processor to provide an indication of the change made to the contact file for the particular contact within the first one of the user collections to an administrator.

84. (Withdrawn) The relationship management system of claim 83, wherein the reporting routine is further adapted to provide the administrator with the ability to accept the change to be made to the another contact file for the particular contact within the firm collection before the change is made to the another contact file for the particular contact within the firm collection.